

# Best Practices for Equitable Engagement

Regional Housing Technical Assistance Program



# EXECUTIVE SUMMARY

The following Best Practices provide recommendations, “How-To” guidelines, and other resources to help Bay Area cities, towns and counties engage with all segments of their communities in meaningful and productive dialogue on housing issues. This document focuses on how to engage with Equity Priority Communities (EPCs), which are or have historically been underserved and faced disadvantage due to their background or socioeconomic status.

As defined by the Association of Bay Area Governments (ABAG) and the Metropolitan Transportation Commission (MTC), EPCs are census tracts that have a significant concentration of under-resourced populations, such as households with low incomes and people of color. A combination of additional factors helps define these areas. This is described in detail on the [ABAG website](#).

For the purposes of this guide, we’re using the ABAG-MTC definition of EPCs to denote California Department of Housing and Community Development (HCD) special needs populations, because the approach to outreach is similar for both populations. As part of conducting meaningful public engagement, it is important to:

- Understand the specific barriers to participation facing local residents.
- Tailor messaging, messengers, and engagement methods to overcome these barriers. Including more diverse voices in the planning process will result in better housing programs and policies.

To communicate to residents of EPCs the purpose, importance, and benefit of participating in the housing element planning process:

- Use clear, relatable language.
- Acknowledge past and ongoing harms connected to unfair public policies (e.g., land theft from Indigenous peoples, redlining, racial covenants, urban renewal, highway routing through Black and brown neighborhoods).
- Ensure messaging and engagement tools are accessible to as many people as possible, including non-English speakers, with culturally sensitive translation and interpretation. Information must also

be compliant with the Americans with Disabilities Act (ADA) and Section 508 guidelines to provide equitable access to people with different abilities.

Collaborating with trusted local voices, such as community leaders, community-based organizations (CBOs), nonprofits, religious organizations and other departments and agencies, will help you further refine the messaging and develop diverse and culturally appropriate methods to engage historically marginalized groups. Local messengers foster relationships. This approach can bridge gaps in understanding and participation that stem from distrust of powerful institutions, disabilities, access and comfort with technology, or language and interpretation needs.

Finally, the State of California requires local governments to demonstrate throughout the planning process that all community members are welcome to participate, that their input has been heard and reflects a range of views, and that their comments are being documented and considered in the planning process. This includes HCD’s identified special needs populations.



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# HIDDEN IN PLAIN SIGHT

What defines an Equity Priority Community



To achieve equitable engagement, it's important to identify the full range of audiences that need to be engaged in the planning process – jurisdiction-by-jurisdiction, neighborhood-by-neighborhood and even block-by-block.

There are online tools that can help you research and map Equity Priority Communities in your jurisdiction. Some of these tools are listed. But first, it's important to understand how these communities are defined regionally and consider criteria that is specific to your jurisdiction.

According to the MTC/ABAG Plan Bay Area 2050 Equity Priority Communities Spatial Analysis Mapping Project, there are a wide range of factors that constitute EPCs. There may be constituents in your jurisdiction that fall within several of these categories or perhaps just one. The detail below comes from the [Mapping Project](#) and data packets provided to each jurisdiction provide additional information on how to determine the populations in your community that need specialized outreach.

## EPC Factors: Mapping Project

# 70%

**or more members are people of color** – American Indian or Alaska Native; Asian or Pacific Islander; Black or African American; Hispanic/Latino; Multiple Races; or Other.

# 28%

**or more are low income** – Meaning a person living in a household with incomes less than 200% of the federal poverty level established by the U.S. Census Bureau, roughly \$34,000 a year.

# 14%

**or more are severely rent burdened** – Renters paying more than 50% of income in rent.

# 12%

**or more are people with a disability** – The U.S. Census Bureau defines disability as: a long-lasting physical, mental, or emotional condition. This condition can make it difficult for a person to do activities such as walking, climbing stairs, dressing, bathing, learning, or remembering. This condition can also impede a person from being able to go outside the home alone or to work at a job or business.

# 18%

**or more belong to a single-parent household** – Families with at least one child.

# 15%

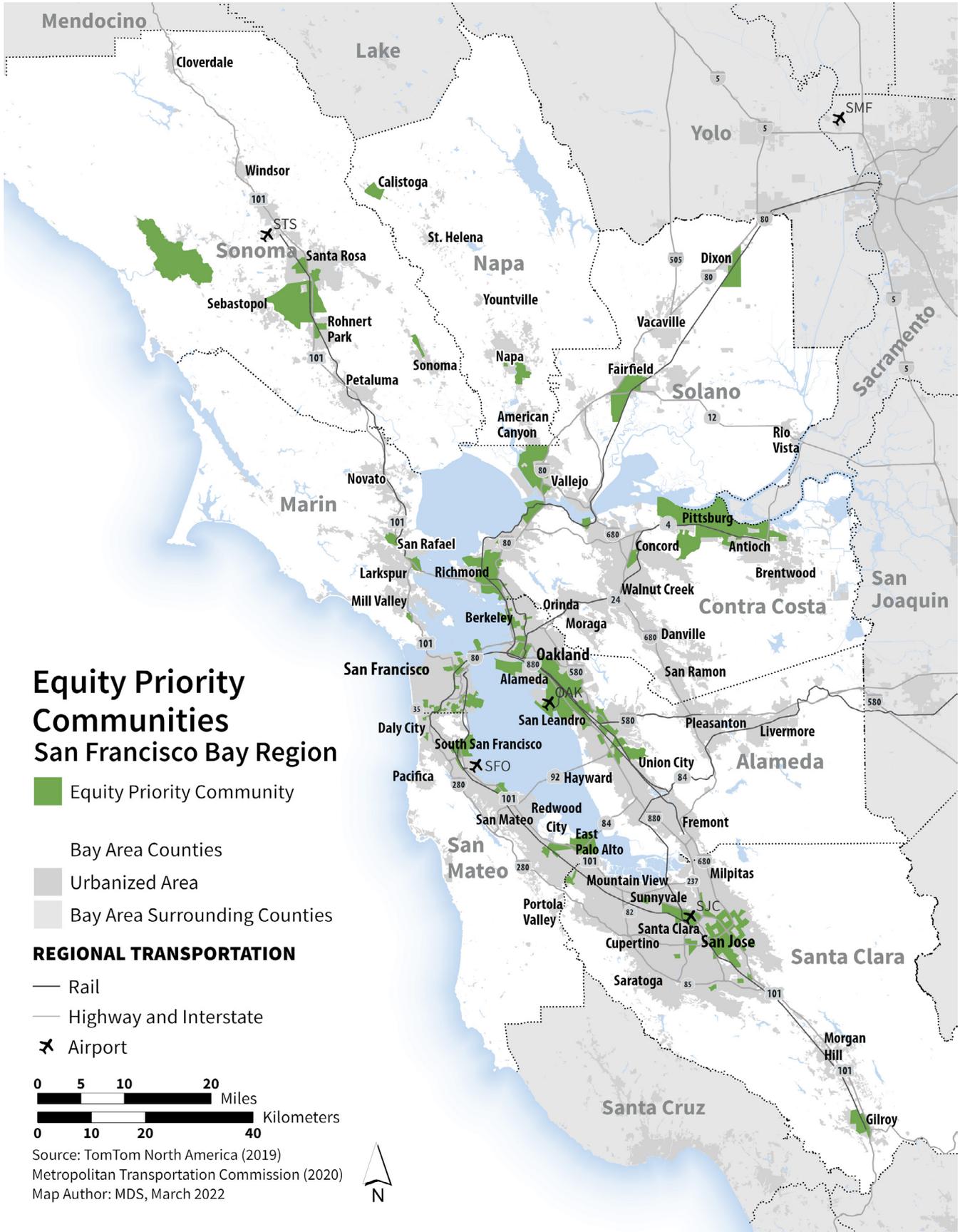
**or more do not own a vehicle.**

# 12%

**or more have limited English proficiency** – Person above the age of five, who does not speak English as their primary language or has a limited ability to read, speak, write or understand English well.

# 8%

**or more are seniors over 75.**



As shown in this regional map, EPCs are found throughout the Bay Area in rural, suburban, and urban areas.

In addition to the map, below are tools that may be helpful in identifying Equity Priority Communities in your jurisdiction:

[HCD's identified special needs populations](#)

[Cal Enviroscreen](#)

[Oakland Dept. of Transportation Equity Toolbox](#)

[SFMTA Equity Tool](#)

[CALCOG Equity in Transportation Planning Compendium](#)

[Framework for Federal equity assessments](#)

Although these are useful tools, they may not provide you with a comprehensive picture.

Ask yourself and community members, “Who is missing from the table?” For example, small groups of underrepresented individuals within your jurisdiction may be widely dispersed among more affluent neighborhoods and not visible through the mapping tools. They may also be composed of primarily undocumented or unhoused community members. It is necessary to go beyond data maps and seek other methods for developing a comprehensive community profile to ensure you are reaching all members of your community.

The individuals and organizations within your jurisdiction, as well as counterparts at other agencies and departments may have firsthand, extensive knowledge of these various community members and can help you develop a better understanding of the complexities of your city, town, or county and its residents.



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# BRIDGING THE BARRIERS



Start by asking: How did the EPCs in your jurisdiction form? Examine immigration and emigration patterns over time. Do community members share the same language, dialects, cultural values, and histories? Do community members receive their information through the same means?

Engaging CBOs, nonprofits and community leaders is a key element of building trust and reducing barriers to participation. Ideally, CBOs and other community ambassadors should be identified and enlisted as full, compensated partners during the very earliest phases of the engagement process – beginning by seeking input on what an equitable engagement process may look like in your community and co-setting measurable [goals](#).

These ambassadors may continue to serve as sounding boards and megaphones throughout the public engagement process, helping to further define and address the specific barriers to participation. Their role also ensures authentic and effective messaging, leveraging their relationships within the communities, helping deploy the most locally and culturally appropriate communications tools. Engaging CBOs and other community members can help build trust in communities where it may have been eroded due to historic disenfranchisement of EPCs or other factors.

## Other Best Practices for Developing an Equitable Engagement Process

### The Importance of Acknowledging both Past and Current Inequities

There are many common barriers to engaging Equity Priority Communities in the housing planning processes. These include language and cultural differences; lack of a car or transit access; lack of childcare; accessibility barriers for those who have physical disabilities or who are sight or hearing impaired; and timing barriers for workers who cover non-traditional shifts.

As diverse as these challenges are, perhaps the most universal barrier is the distrust of powerful institutions

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among EPCs. This is a challenge that cannot be overcome simply by providing language translation, a transit pass, a free meal, or on-site daycare.

Lack of trust in participating in public planning processes lies in the historic harms that many communities have experienced, often at the hands of the public institutions that have denied them access to the amenities that typically make up a “good” neighborhood (quality schools, access to healthy spaces for recreation, etc.) EPCs have not been consistently or widely included in previous development processes, and often have been deliberately excluded from weighing in on neighborhood changes.

As a result, any engagement process with EPCs should begin with a public acknowledgement of the historic inequities that the convened community members have faced, and an invitation from impacted community members to share reasons they may have to distrust the public process. You must make a concerted effort to listen empathetically to earn the trust of historically disenfranchised communities. As the author [Adrienne Maree Brown](#) says, it’s critical that equitable community processes “move at the speed of trust.”

## Getting the Message Right

Messaging must be clear, concise, and consistent. It should explain, in layperson's terms, what a Housing Element is and why the planning process matters.

**The term Housing Element implies technical knowledge that many members of the public do not have. Use the phrase “planning for housing” instead.**

It's best to start any conversation focusing on [why](#) the Housing Element update is taking place. Powerful and compelling arguments about why this work is important will likely get more support.

Some questions to consider before crafting talking points:

- How can the Housing Element process unite and support the community?
- Do residents have a personal experience they can draw upon to help introduce the topic?
- Is there ongoing work that Affirmatively Furthering Fair Housing (AFFH) may strengthen? Additional information about AFFH is available on the [ABAG website](#).
- Are there reasons that fair housing or desegregation is a particular interest of residents?

**While community engagement on the Housing Element is mandated by law, there's a bigger reason why the community should participate in the process: the future of the community hinges on these conversations.** It's a chance for the community to directly influence how and where housing is allocated, along with general planning.

### Assess and Contextualize Residents' Priorities

Connect housing to other issues residents care about. Some questions to consider are:

- What are the big issues your residents are focused on right now?
- How can you connect the Housing Element process and other activities to those concerns?
- How can connecting the Housing Element process to these other issues (i.e. traffic, green space, safe streets) help achieve your vision for the community?

Ideally, this messaging should be vetted by CBOs and EPC community leaders to ensure it will resonate with their communities, friends, and neighbors. It must define opportunities for public input and explain how input will help further develop the plan. The messaging must convey a clear call to action and address specific, actionable requests of the community. Relevant messaging will connect housing to other community needs, such as jobs, schools, healthcare, and transportation. It will be communicated in multiple languages, if needed, and through methods that are



accessible to all. Consider using the US Census Bureau list of languages spoken in the Bay Area to ensure accessibility is appropriately vetted (see below).

## Communications Best Practices

Based on research, the strategies below are the Best Practices for speaking with community members about the Housing Element:

- **Center Equity and Systems Change:** Make equity a touchstone in all messaging and integrate new narratives that convey the importance of housing as a means to economic security and community well-being. This strategy aims to show how cities can deepen their commitment to racial equity by undoing exclusionary zoning and meet their legal obligation to affirmatively further fair housing (AFFH).
- **Attach and Amplify:** The idea of housing is tied to emotional, financial, and environmental security, so attaching messaging to these issues is a good way to underscore that housing is a deep-seated need.
- **Reframe:** Remind the public of what’s at stake if we fail to act. Demonstrate that the negative consequences of not prioritizing housing as an issue are borne by all of us, not just the people struggling

to find housing. This strategy comes in handy when you are talking to people who believe that housing inequities are rooted in the bad choices individuals or families have made or when people believe that changes to land use or housing policy will have a negative economic impact on them personally or their whole community.

- **Avoid Challenging Different Points of View and Focus on the Facts:** During your planning, identify the common misperceptions and unproductive narratives about housing, so that you are prepared to set the stage early in public conversations in a way that refutes misinformation by presenting the facts.
- **Avoid the Term “Housing Crisis:”** Instead of galvanizing residents into action, the term “housing crisis” can feed a sense of cynicism since this “crisis” is one that has been going on for years and only seems to get worse. Rather, reframe the Housing Element process as a chance to create “equitable housing opportunities.”

## Top 13 Languages Spoken in the Bay Area

Here’s a quick summary for the nine Bay Area counties – note there are many variations on the level of language detail in this survey, including English language ability. This is just an accounting of languages spoken in somewhat aggregate categories by individuals ages five and over. For more detailed data, please see the Census Bureau’s American Community Survey, [Table C16001](#).

Language	Number of People
All	7,286,677
English Only	4,196,108
Spanish	1,204,144
Chinese (incl. Mandarin, Cantonese)	577,807
Other Indo-European languages	352,903
Tagalog (incl. Filipino)	245,275
Other Asian and Pacific Island languages	227,530
Vietnamese	178,571
Russian, Polish, or other Slavic languages	72,197
Korean	61,055
Other and unspecified languages	53,904
French, Haitian, or Cajun	46,869
Arabic	35,509
German or other West Germanic languages	34,805

ABAG has worked with the Non-Profit Housing Association of Northern California and D&A Communications to develop a Communications Guide to help Bay Area policymakers and local government staff hold productive conversations with residents about planning for housing.

The full Guide is [available here](#). It is based on existing

and new research and includes consistent, clear language for how to talk about housing, including Affirmatively Furthering Fair Housing legislation. The Guide also includes background information on housing legislation that can be shared with residents and a script for holding public meetings.

**Also related to messaging – It is important during the early phases of engagement to develop language designed to educate and gain buy-in from EPCs on existing conditions and potential trade-offs, which will help build consensus and understanding for final decisions.**

### Enlisting the Right Messengers

Work with community leaders to identify and enlist the people in the community who can help gain broader participation. Ideally, community members involved in the current planning process will be justly compensated and motivated to continue on as community leaders for future initiatives. They can include your staff members and colleagues, faith leaders, neighborhood leaders and youth activists.

### Encouraging Ownership of the Process

Encouraging community members to tell their own stories about housing equity and why it's important to them can provide a sense of ownership of the housing plans and programs, thus fostering authentic and sustained community-based engagement and advocacy.

### Reaching People Where They Are

Creating opportunities to talk and listen to community members at places where they already meet can help address a potential barrier to participation.



**Show up with approachable materials, equipment, and attire** to wherever community members gather, such as:

- Churches
- Senior and community centers
- Food banks
- Transit hubs
- Shopping centers
- Places of employment
- Social service sites
- Public parks



**Set up approachable pop-up events in diverse public spaces** like flea markets, libraries, community college campuses, community fairs and other accessible locations



**Take the conversation to where your community meets online** (Facebook, NextDoor, WeChat, WhatsApp, etc.)



**Conduct workshops and meetings** in-person, online and in hybrid formats



**Go to neighborhood association meetings, block parties**



**Distribute in-person and online surveys** (Ex: City of Oakland Crowd Sourced Housing Map)



**Conduct** telephone town halls



**Host** walking tours/open houses



**Other options:**

- Text/SMS-based engagement
- Games or simulations, which can be low-tech, such as neighborhood housing inventories

# TAILOR COMMUNICATIONS TOOLS TO YOUR COMMUNITY



## From door hangers to direct mailers to direct messages online, different communities prefer to receive information and provide input through different communications channels.

Consider publishing information through a wide variety of channels, including social media, local print media outlets, community-generated publications, television, radio, online and through word-of-mouth. Engage with your audience through their preferred channels and offer easy ways to provide input – from an intuitive online platform to postage-paid comment cards.

Consider providing food and free childcare at public meetings, financial incentives to complete surveys, transportation to in-person events, call-in options for online meetings and partnering with other staff and agency departments.

### Engaging the Hardest to Reach

Reaching the undocumented, the unhoused, the homebound and the indigent can be especially challenging. Reaching them will require partnering with other agencies, including local health clinics, faith-

based communities, social services agencies, homeless advocates, CBOs and other trusted support providers to help ensure that the most vulnerable voices are heard.

### Leveraging Partnerships

Partnerships with CBOs and nonprofits build capacity and longer-term relationships with under-resourced communities. This type of partnership allows you to tailor engagement opportunities to specific communities by using appropriate and culturally relevant strategies in the planning process and future efforts.

When possible, create opportunities for community leaders to directly address policy makers and project planners. Consider establishing a stakeholder committee that includes both decision makers and leaders from Equity Priority Communities.

For local jurisdictions – often with limited staff resources and capacity – partnering with community colleges and local high schools can serve as “boots on the ground” and increase the reach of engagement opportunities.

Community engagement efforts by CBOs generally go beyond their regular services. Therefore, their efforts should be appropriately compensated through stipends, grants, gift cards or other forms of payment.

The case studies below illustrate a few success stories that stem directly from equitable engagement of the hardest to reach and the effective leveraging of partnerships.

Communities participating in the RHTA program have received sub-grants that could cover payments to CBOs and their members.



### Case Studies: Innovative Community-Based Engagement

#### Relationships with Community-Based Organizations - Plan Bay Area 2050 and Beyond

ABAG and MTC are committed to pursuing equitable public engagement by actively courting communities that historically have been disinvested, under-resourced and excluded from decision-making processes. We continue our pioneering approach to engagement by partnering with community-based organizations, which are crucial to connecting

with and genuinely hearing the perspectives of impacted community members. Partnerships with CBOs help foster trust and understanding with the communities the CBOs serve and elicit valuable insights through focus groups, surveys, and direct feedback (including from CBO leaders, who live and/or work in the communities they serve). As COVID-19 disrupted everyone’s plans, eight CBO partners were instrumental in co-creating and maintaining listening channels to ensure that Plan Bay Area 2050 reflected the insights of people most impacted by MTC’s and ABAG’s policy decisions.

## CBO Relationships and Sacred Heart Community Service: Engaging Unhoused Community Members

The agencies' public engagement work has included efforts to reach the unhoused to ensure that their needs and perspectives are also heard. One of the partner CBOs, Sacred Heart Community Service, has been particularly effective in this regard, given its role as a Community Action Agency for Santa Clara County. Through its food and clothing, housing and financial assistance, employment, and public benefits programs, Sacred Heart was able to reach and invite homeless people to participate in focus groups. Members of the MTC Policy Advisory Council also shared their expertise and connections to help reach organizations that serve unhoused communities.

## Engaging the Future Generation: Student Engagement for Plan Bay Area 2050

Recognizing the need to elevate youth voices, ABAG-MTC partnered with [Y-PLAN \(Youth - Plan, Learn, Act, Now!\)](#) in a year-long process of equitable, authentic engagement of youth in grades K-12 in long-range regional planning.

Y-PLAN is an award-winning educational strategy and action research initiative that empowers young people to tackle real-world problems in



Photo Copyright Kingmond Young, 2018



Plan Bay Area 2050 Pop-Up @ SF Chinatown YMCA Photo Copyright Noah Berger / 2019

The CBOs with which ABAG and MTC worked to develop Plan Bay Area 2050 are identified in [Plan Bay Area 2050 Public Engagement Report October 2021](#), page 6.

their communities through project-based civic learning experiences. This effort resulted in the [Horizon Y-PLAN Pilot Partnership Research Brief](#), which identifies lessons for engaging Bay Area youth in planning work—particularly Plan Bay Area 2050.

As one of the first efforts to implement these lessons, staff partnered with the Spare the Air Youth Program on a series of Cocoa Club meetings, where students came together to identify their priorities for implementing the strategies in Plan Bay Area 2050 during the Final Blueprint phase.

When the draft Plan Bay Area 2050 was published, ABAG-MTC again partnered with the Spare the Air Youth Program to conduct a video contest that asked students what their favorite Plan Bay Area 2050 strategy is and why. A [short compilation video of the students' submittals](#) was then presented to policymakers prior to the plan's adoption.

# WE HEARD YOU

Communicating how community members' input is meaningfully incorporated



To this point, we have identified Best Practices for how to reach Equity Priority Communities and how to navigate their complexities. We have also outlined some common barriers to participation that may exist in your own community along with recommendations on collaborative goal setting, metrics, messaging, and tools tailored to specific audiences.

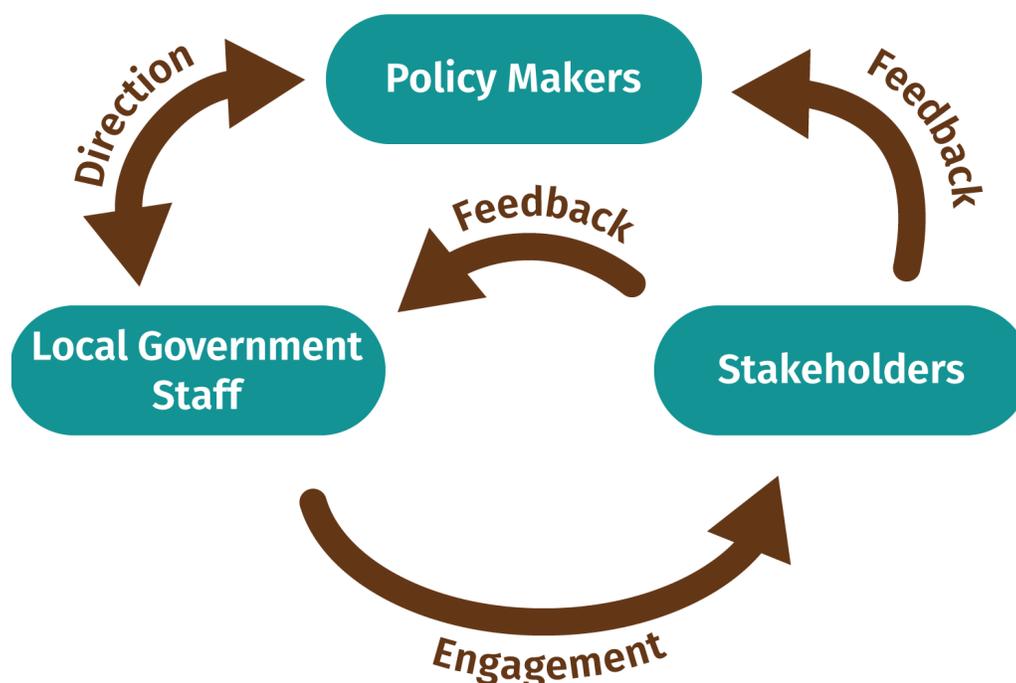
Equitable engagement is a two-way street: gathering input and demonstrating that community feedback impacts the resulting housing plans. To successfully break through the barriers to EPC participation and to create meaningful dialogue, it is critical to clearly show that members of Equity Priority Communities are heard. This can be communicated through community leaders and other ambassadors, illustrated through graphic notation, or documented with interactive online engagement tools as well as through traditional methods such as meeting summaries and notes.

As required by HCD, it is vital to document and communicate how and from whom community input was gathered, how it is being synthesized, with whom it is being shared, and how it is helping to inform

the next phase of the housing planning process. The [Housing Element Completeness Checklist](#) is an excellent resource to catalog and report outreach activities. Ideally, community input will be shared with staff at your jurisdiction, with elected officials and policy makers, with key stakeholders, and of course, with community members. Reporting on community engagement is also an HCD requirement.

For example, all staff reports to policy-making boards should include a summary of comments heard and recommendations from the community, along with a section showing how the input helped shape staff recommendations. In cases where community input cannot be incorporated, the staff writeups should explain why the comments weren't incorporated and outline how those comments may be used to shape future plans and programs. Likewise, CBO participants should hear directly from your agency on how their comments are being used, through some of the same channels used to encourage their participation.

## Cultivating Trust: Public Engagement Process



Returning to the community to review how their input informed the planning process is foundational for ongoing and deeper engagement in future planning processes. The more that people see their perspectives reflected in current plans, the more likely they are to participate in future planning processes. Clearly and transparently explaining the evaluation process within the context of housing and community development requirements is key to cultivating trust and partnerships between community members and public institutions.

### Evaluation Tips

- HCD [Public Participation Requirements](#).
- Evaluating feedback from hard-to-reach communities vs. easy-to-reach communities to identify differences.
- Provide resources in other languages. More details at [ABAG's Outreach Resources and Translation Services page](#).

### Accountability Best Practices

- Notify the public about additional engagement opportunities.
- Communicate often and through diverse channels.
- Agree/confirm at each planning interval how Equity Priority Communities' input is informing the next phase of planning.
- Keep members of Equity Priority Communities informed about outcomes.
  - Impact of comments: how community input was integrated.
  - Decision rationale and transparency: when outcomes differ from popular opinion – ideally this will be mitigated through gaining buy-in on trade-offs early in the planning process.

**The goals and objectives of equitable engagement that you define with community leaders early in the process must be consistently monitored, measured, and reported. Ideally community leaders will become trusted partners to ensure equitable engagement at all phases of the planning process.**

**Consult the [GARE Equity Resources Guide](#) to identify supplemental steps you can take to strengthen your equitable engagement strategy.**



### Lessons to Take Home

Equitable engagement processes depend on how well you know your community and adopt proven outreach strategies to meet specific community needs. Begin by doing a thorough analysis to identify Equity Priority Communities in your jurisdiction. Take the next step and make a concerted effort to speak to people within priority communities to confirm that you have a comprehensive understanding of community complexities.

- **Continue to work with community ambassadors by building consensus** around what an equitable housing process would look like in your community.
- **Develop appropriate messages** that are clear and actionable.
- **Enlist trusted messengers** who will help build community trust and participation in the process.
- **Listen closely to the feedback** shared and engage community members and voices that have not been heard in the process.
- **Monitor participation** throughout the process and refer back to this guide to refine your methods of keeping the community involved as needed.
- **Demonstrate to the community how their input is helping** to inform the process.
- **Finally, using community-informed metrics, assess how effective and equitable** the engagement process is and how it can be improved.

# APPENDIX

## HOMEWORK: SUGGESTED TOOLS AND RESOURCES

This is an example of a simple worksheet that can be tailored to your housing planning engagement process. Completion of the worksheet will help address specific barriers to participation in your community by building a comprehensive understanding of language needs, demographics, and preferred channels of communication.

Audience	Teenagers	Seniors	Single Parents	Low Income Households	People of Color	People with Limited English Proficiency
<b>Messages/Languages</b>	English and Spanish, Stay Active in Your Community: Join the Process					
<b>Messenger</b>	High School Seniors, 1st Year College Students					
<b>Communication Barriers</b>	Rapid and Saturated Social Media Channels,  Not Organized into Housing-Focused Advocacy Groups					
<b>Communications Tools</b>	Online Surveys and Live Meetings via Instagram					
<b>Reporting Back</b>	Video Reports via Instagram					
<b>Timeline</b>						

### California Department of Housing and Community Development

[Housing Element Completeness Checklist](#)

### Additional Demographic/Research Tools

It is important for local jurisdictions to research and understand the demographics of their own communities. [This map is a tool that can help.](#)

### Messaging Matters

Keep language clear and simple: [Clear League Group recommendations](#)

## Reach People Where They Are

[ABAG resources for online engagement](#)

## Meaningful Metrics

[SMARTIE Goals](#)

## Equity Resource Guide Example

[Government Alliance on Race and Equity](#)

*The Best Practices for Equitable Engagement were created by the Regional Housing Technical Assistance Program of the Association of Bay Area Governments, with support from [Circlepoint](#), an environmental and community outreach consulting firm.*



**ASSOCIATION  
OF BAY AREA  
GOVERNMENTS**



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